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ABSTRACT

Distance education (DE) materials take a learner-centered approach rather than the traditionally content-centered approach of textbooks. This fact has several implications for the editing of DE materials. The role of the editor within the DE organization will depend on the organization's size and structure. The basic features of the DE program or course will be dictated by the organization's academic structure. For any new program, fundamental decisions must be made regarding the materials' format, components, and style. Individuals responsible for editing instructional materials must address issues in the following areas: instructional design; academic editing; plagiarism, copyright, and ownership; and relations with authors, academics, and administrative staff. The following are some guidelines for addressing these issues: (1) ensure that the manuscript conforms to course objectives and that it contains clear course, unit, and/or chapter objectives; (2) ensure that all instructional resources are linked, activities provide feedback, and assignments and assessments comply with university-wide recommendations; (3) edit the materials with their audience in mind; (4) keep materials student-friendly and avoid gender and racial bias; (5) learn to spot plagiarism; (6) keep authors briefed on the editorial process and liaise between administration and academics. (Contains 24 references.) (MN)

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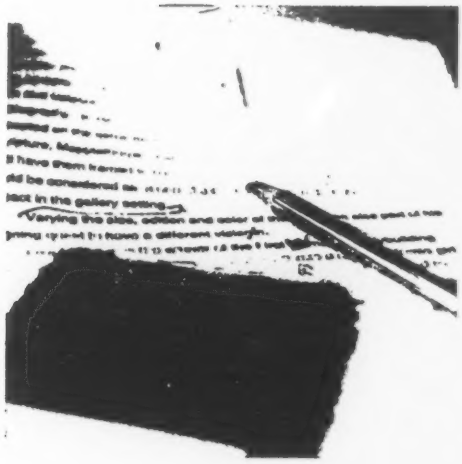

Editing Distance Education Materials

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The key is the student. Learners need to become involved and motivated by the materials and to take ownership of the skills and knowledge that they acquire. This has several implications for the editing of distance education materials.

Distance education materials take a learner-centred approach rather than the traditionally content-centred approach of textbooks. The key is the student. Learners need to become involved and motivated by the materials and to take ownership of the skills and knowledge that they acquire. This has several implications for the editing of distance education materials. The role of the editor within an organisation depends on the organisation's size and structure. There may be a full-scale publishing department with editorial, production and printing facilities and an educational technology department with instructional designers, or the editor may be a piecemeal addition to an administrative or library facility. The editor may be someone who takes an active role in the course development, or someone who is just given a manuscript to edit. Regardless of the level of involvement, the editor has an important contribution to make.

We start by looking at some basic features of the materials and then at issues an editor needs to address. Finally, we look at the editor in relation to other involved parties. A bibliography gives starting points for more information.

BASIC STRUCTURE OF THE MATERIALS

The basic features of the programme or course will be dictated by an organisation's academic structure. Curricula and syllabuses will be agreed on and set up by academic boards; approval from external supervisory bodies may be required. Detailed aims, objectives, learning outcomes and outlines will need to be drawn up.

LENGTH AND LEVEL OF STUDY

Each programme and each individual course requires a designated number of study hours; this can be broken down into reading, activities, assignments, tutorials, project work, use of other media, and revision and examination. The course level, whether undergraduate, diploma or certificate, will also be specified. From an editorial point of view this affects the content, use of language, general style and the scope of the material. An undergraduate student is expected to be able to read much more, and in greater depth, than a diploma or certificate student. A precise numbers of pages for the course may need to be specified from a cost and production point of view. As the editor, you will provide advice, and rewrite or cut material. Editors must also accommodate the often conflicting demands of academic, administrative, production and finance staff (see *Dealing with Authors, Academics and Administrative Staff*).

HOW ARE THE MATERIALS MADE UP?

For any new programme, fundamental decisions about the overall format need to be made. Is it a textbook, or a course based on a textbook and other resources? Is it a stand-alone? If not, what materials or delivery mechanisms need to be co-ordinated? How is course material divided? Are there production and printing issues? How often, and in what way, will material be revised? Should the colour photos, resources, articles or case studies be a separate item? Will additional library or online resources be used? These decisions need to be made at the start. If you have a pattern and a format for the whole programme or series, everyone knows where they are.

WHAT IS THE DETAILED MAKE-UP OF COMPONENTS?

Basic components need to be split down into a structured design that's workable across the whole programme. Textbook material can be split into chapters or units and then into sections, with or without numbering depending on your chosen style. Use introductions and summaries within the course and within individual units to identify what's there and why, and to wrap up a section or topic. This is particularly important in distance education, where you need to continually spell out what is happening and then review it afterwards. Units or chapters may have equal length and study time, and if not, should include an explanation of why they're different and how students should approach them.

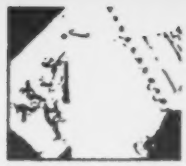
WHAT IS THE FORMAT AND STYLE?

The format could be loose leaf, spiral bind or soft cover. Decisions may depend on local availability of production facilities. Perhaps production is in-house; if there is a print shop, a production and design department, or a desktop publishing (DTP) department, they will have their own constraints on equipment and schedules.

You need to work with your internal production people and establish exactly what they want in terms of the text and graphics, software applications and what kind of copy editing they expect from the editor. A design can be drawn up for a rough idea of the finished product. Detailed style instructions can also be decided; you may be able to work from a template (see *Copy Editing*).

INSTRUCTIONAL DESIGN

So with manuscript in hand, you need to ask: does the manuscript conform to course objectives? You could start by looking at the course and chapter introductions, then at the unit and section introductions, and finally at the summaries. The format is hopefully common across all programme courses; distance education materials are most effective if they are driven by precise objectives. However, there may need to be some flexibility to allow for different types of academic content.



COURSE AIMS AND OBJECTIVES

These will be derived from the outlines specified by the academic structure of the organisation, and should be included in the introduction to the course, along with a general content outline.

UNIT OR CHAPTER OBJECTIVES

These should be identified at the beginning of each unit or chapter and should build up to the overall course objective. The written objectives should be unambiguous, without jargon, and most importantly, achievable. Watch the verbs used; for example, *understand* is pretty vague. How will a student know when, or if, they understand? Words like *evaluate*, *apply* and *describe* are all more quantifiable. Use wording appropriate to the target level of academic achievement for the course.

The author should build the objectives into the content and the overall structure of each unit and ultimately, of the course. Students should be able to meet course objectives by working through the format of the material, and they should be able to see that the objectives have been achieved. Objectives can be numbered to help the student. Activities and the unit review activities, in particular, should help the student meet and see the objectives. Study material should be split into manageable chunks of about two to three hours of evening study time.

LINKING ALL RESOURCES: TEXTBOOKS, SOFTWARE AND OTHER MEDIA

If the author has used a variety of materials you must have all the resources on hand to check that they co-ordinate and that the instructions work. Don't be too surprised if they don't initially! And make sure that the different modes of delivery enrich the course, and have not been used just for the sake of it.

ACTIVITIES WITH FEEDBACK

Activities should be used to help break the content into suitable learning blocks, encourage and motivate, and enable the student to gauge their own understanding and progress. Feedback can identify a student's problems and how they can get back on track.

Activities should be unambiguous; the student shouldn't have to second guess. The instructions should be clear and the questions should be answerable, unless they are being used to develop critical thinking and are of the open-ended, "what if" type. The type of answers and depth of analysis required should be obvious to the student, although particular subjects will have precise answers while others will not.

Make sure that activity commentaries are differentiated, in style and content, from the main text. Commentaries should not be designed just to regurgitate previous content; they should challenge students to think more deeply, and to put concepts into context. Shorter commentaries could follow an activity; longer ones are likely to be placed at the end of the unit to encourage students to do the activity, rather than just review the answer. Commentaries should build up throughout the text to ultimately meet unit and course objectives; review activities are useful ways for the student to consolidate before going on.

The editor needs to look at all these points with a critical eye, and must effectively DO all the activities in the course of editing.

ASSIGNMENTS AND ASSESSMENT

Assessment will probably be dictated by university-wide regulations, say, 30 per cent for assignments and 70 per cent for examinations. However, students need feedback to make sense of a distance education course. With this in mind, there could be compulsory submission of particular assignments, with the best marks taken into account. Some university regulations don't allow the return of student assignments with comments, so any feedback may need to be documented separately; these details need to be checked, as the author may not have done so. An accompanying assessment booklet can contain assignment details, submission and marking guidelines, examination guidelines, techniques and specimen questions. More general information may be supplied in other course documentation, if necessary. The editor needs to make sure that all information from administrative and academic staff agrees.

ACADEMIC EDITING

The key to editing academic materials is to use common sense, and to develop critical but supportive approaches. Take it stage by stage; you cannot hope to take in all levels of structure, activities and detail at the same time.

PUTTING YOURSELF IN THE ROLE OF THE STUDENT

There are a number of questions you need to ask. Does the course make sense? Is there a framework? Can I follow the instructions? Do they make sense? Are all the parts there? What do I need to know before I start? What do I need to have with me to study?

Break up the text with lists and bullets to bring out key points, but don't overdo this so that the content just becomes one big list. Use white space; if the activities are to be written in a workbook, you need to leave an area for writing.

NOT BEING A ROCKET SCIENTIST

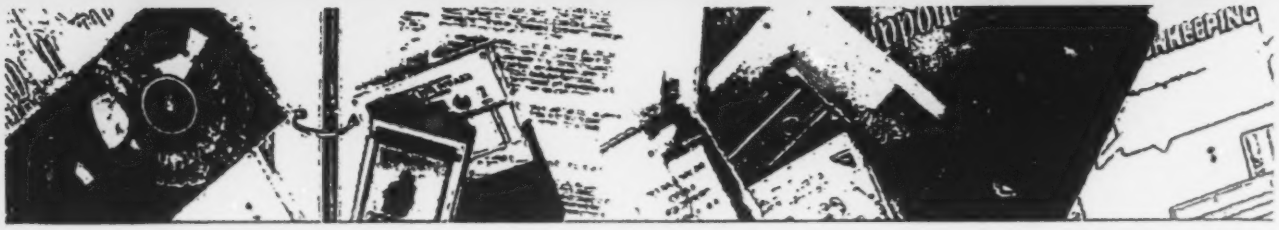
Even if you don't understand it all, you can understand whether the sentences make sense or not, and follow on from each other. It may be even better if you're not an expert in the field as you don't put your own understanding and interpretation into the author's words. If you can't understand it, then the student probably can't either. If there are unexplained terms, abbreviations or jargon, or if there is ambiguity, clarify with the author. You need to check that the topics are given appropriate treatment; perhaps some weighty topics are dealt with superficially. This may reflect the author's interests rather than the student's needs. As much as possible, you should be using the author to help you.

REMEMBERING YOUR AUDIENCE

The student is likely to be studying in isolation. The materials have to compete with many other demands on their time. Learning should be efficient, effective and fun, and as an editor you can help make it so.

REPLACING FACE-TO-FACE AND KEEPING IT STUDENT-FRIENDLY

The author doesn't have the interaction of face-to-face teaching and cannot gauge reactions; students can't look blank or ask questions, either during or after the event. Authors need to create the same interactional situation on paper, starting with an informal friendly tone and style. Comments to encourage and point out difficulties should be included. Some authors may



find it very difficult to write distance learning materials if they are used to writing academic research papers for journal publication; in adjusting their tone away from this style, they may become very patronising. Watch for this!

Use the active voice, and use *we* and *you*; the text needs to interact with the student. Use short sentences; this is teaching material and needs to be readily understood. Unnecessarily long words and long, convoluted sentences are misplaced; this is not a literary or academic paper. English may not be the first language of some of your students, so don't make it too difficult for them!

AVOIDING GENDER, RACISM, BIAS

It is very easy for an author to lapse into some kind of bias unintentionally. Use *he or she* instead of a single gender in descriptions. Watch for stereotyping in examples, and what and where they are taken from: for instance, a housewife, referring to a doctor as *he*, a nurse as *she*. Avoid remarks concerning ethnicity, religion or culture except where appropriate to the material. Check with the academic institution for any existing guidelines.

COPY EDITING

Copy editing can be a somewhat complex component of the professional editing process but there's no mystique here, just common sense rules that need to be applied thoroughly. You will need to format the overall structure, including the copyright page, a detailed contents list and chapter openings. The academic institution may have a style manual you can follow.

RULES OF COPY EDITING

Aren't rules just being picky? No; if there is consistency, the student will find the content easier to concentrate on! Also, the author must have accurate spelling, punctuation and grammar. After all, he or she is insisting that students have these points correct in their submitted assignments, projects and examinations.

STYLE SHEETS

This could include a house style sheet for textual details and a word processing template for layout and typographical style. Set up an editorial house style sheet for: punctuation, spelling (American or British English, for example, plus specific unusual or technical words and terms), abbreviations; use of numerals; use of units of measurement; use of capital letters; styles for identifying tables and diagrams, and a style for referencing and for the bibliography. It's easy to refer to and you don't have to keep remaking decisions. Other editors, proofreaders and authors can follow the same style also, avoiding argument.

For a word processing template, identify a format for lists, bullets and tables; specify a hierarchy and number of topic headings and sub-headings. Also spell out what they are and when they can be used. The production or DTP department will probably need to set the template up for you. However, it may be difficult to get your authors to follow it and you may have problems with different versions when you send back to the author with queries or corrections. But even though the result may not be perfect, document files can be tidied up later.

DOTTING Is AND CROSSING Ts

It's hard to keep in sight the overall framework, the linking of objectives and activities, a sense of individual sentences and paragraphs and the details of style and spelling all at once! But don't worry, you will find your own way of doing this as an iterative procedure. You do need to check punctuation, spelling and grammatical details thoroughly, though; electronic spelling and grammar checkers don't catch everything!

USING TECHNOLOGY AND KEEPING TRACK OF VERSIONS

These days you are likely to be editing with a computer and directly on screen. Use your word processing programme for spelling and grammar checks, to replace words or expressions throughout the document, and to cut and paste for structural editing.

Number your versions; try sending the latest edited version back to the author for correction and for answering queries. Don't be surprised if he or she makes corrections on an earlier version, not your edited version, and then sends that one back instead! Try to specify which version the author should make corrections on, or you'll have to trawl through the earlier version sent back to you to find the appropriate changes. You can try e-mailing versions, but watch the numbering of documents carefully.

DEALING WITH PRODUCTION

Make sure you know what your production or DTP department wants in terms of the style sheet or template, word processing software, graphics, tables, and even details such as tabs, paragraphs, indexing, footnotes and reference numbering. You may find that you are doing a lot of work on the style, for example, bold, italics and headings, that are just wiped out when your version is imported to a DTP programme or into a Mac version from a PC version. Even different versions of the same word processing programme can cause problems. Mathematics and chemical formulas are particularly problematic. Don't try and do production's job for them; you're probably just making it worse!

PLAGIARISM, COPYRIGHT AND OWNERSHIP ISSUES

COPYRIGHT: WHAT IT IS, HOW IT AFFECTS YOU

Ownership of the original material needs clarifying: is the copyright holder the author, the department, the school or the university? And the material needs to carry a copyright to protect it, with the date. Depending on where the material is published and whether the country is covered by the Berne or Universal Copyright Convention, the form of this is slightly different. The textbook and other components should carry a copyright page with the copyright notice, addresses, printing history, editions, ISBN if it is publicly published material, and notices about moral rights and restrictions on use and photocopying. As the author is unlikely to include all these things, the editor has to.

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Copyright applies to large quotations, figures and tables, as well as cases, journal articles and chapters from textbooks. The editorial or academic department needs to set up a system for clearance and subsequent payment. If a certain number of copies are specified for clearance, this needs to be kept track of. As this is a specialised area, consult some of the documents at the end of this article or your university library or rights department. Use your national copyright agency for help, advice, and for physically clearing copyright.

The production or DTP department probably has format requirements for the larger articles and cases. Should they be pre-scanned, or should good photocopies or originals be supplied for scanning by production? Check early in the editing process when the author still has the materials handy.

REFERENCING AND BIBLIOGRAPHIES

Identify a consistent referencing system that you want to use, and make it easy to follow. For example, author and date can be used in the text and then listed alphabetically at the end of the chapter or unit. References can be numbered in the text and then listed numerically at the end of the unit. Make sure the in-text references are given in the reference list, and vice versa. A bibliography or further reading list are supplementary sources and should be identified as such. These are most useful if students are given guidelines on how to use them, and are directed to specific parts for further study. Web addresses must be current. The most recent editions of textbooks should be referred to; books can get out of date very quickly. It's worth following up with the author. A quoted article may be seminal, or the author may just be using older material!

AVOIDING AND SPOTTING PLAGIARISM

Plagiarism is the unauthorised and unacknowledged use of someone else's material. It's relatively easy to spot with tables and figures; text is harder to identify. If the style of writing, spelling, punctuation is different from the whole but is consistent within a particular passage, take note. You need to tactfully alert the author; he or she may have done it inadvertently. You also probably have many authors' versions of the same kind of material, so don't find yourself doing a cut and paste directly from one to another and mistaking it! It's been done before.

DEALING WITH AUTHORS, ACADEMICS AND ADMINISTRATIVE STAFF

BRIEFING AUTHORS

If time and the system allow, it is helpful to have early editorial briefing sessions with authors. A guideline document for authors is another good method. Authors need to know what expectations you and others have of them, the deadlines for various stages, the overall schedule, and what they are expected to do with the proofs and when. With multiple authors in a project, you need to know who you're dealing with and who has ultimate responsibility, and how discrepancies in quality of work, style and approach are dealt with.

USING THE ACADEMIC REVIEW PROCESS

Use any available expert advice as much as you can. Neither you nor the author should see any review processes as a negative. External expert reviews will also give credibility to requests to the author for amendments or revision.

BEING DIPLOMATIC

Remember that an author may not take criticism well. Some writers will see the editorial process as incredibly beneficial and use it to enhance and improve their material. Others see it as interference and don't want to see anything changed, particularly by someone who is not qualified in their area. You will have to be very diplomatic with the various personalities you will encounter. You need to develop your critical and analytical skills, but you must offer guidance constructively. Call for help from the academic review process or a superior if you have real problems.

LIASING BETWEEN ADMINISTRATION AND ACADEMICS

Your organisation's administration will have views about assignments, schedules, staffing, tutor training and payments that will affect course content. Some academics may not conform to the proposed format and may demand flexibility for their particular course. You may also have to deal with instructional designers from an educational technology department. You need to be aware of what everyone requires. Also, keep in mind guidelines for dealing with extra costs. You will need to monitor budgets, schedules and actual course costs; others may not. The organisation may have procedures for signing off and proof checking by academic and administrative departments. These can help, but the process may be too burdensome.

GENERAL AND DISTANCE EDUCATION

International Centre for Distance Learning, Literature Database: www-icdl.open.ac.uk/icdl

The Commonwealth of Learning web site and Information Resource Centre: www.col.org and www.col.org/irc

Open and Distance Learning (1995) Stephen Brown, London: Kogan Page.

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The 'Times' Guide to English Style and Usage (1992) Tim Austin, London: HarperCollins.

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COPYRIGHT

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Training Toolkit: Copyright & Distance Education (2000) The Commonwealth of Learning www.col.org/knowpub.htm#toolkits

Copyright and distance education: www.fsnic.org/courses/distance/distcourse/copyright.html

Copyright basics: thomas.loc.gov/copyright/circs/circ1.html

Copyright Licensing Agency, UK: www.cla.co.uk

US Copyright Clearance Centre: www.copyright.com

Editing Distance Education Materials
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